

# The Short Guide to Measuring Not Counting

How to Evaluate Social Media  
for Marketing Communications

A cross-industry collaboration between



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About

# #IPASocial Works

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## About #IPASocialWorks

We are hugely fortunate in our industry to have the effectiveness ‘case law’ gathered from the IPA and The Marketing Society, amongst others. This vital work provides knowledge about how most ‘traditional’ communications work in delivering true business value and how they can be made to work even better.



**However, this case law simply does not exist to the same extent when considering the various usages of social – not really a surprise given its relatively recent nascence. This is the gap that the #IPASocialWorks project was designed to fill.**

So we launched a unique, industry-wide initiative, led by the IPA, in partnership with The Marketing Society and Market Research Society, supported by Twitter, Facebook and The London Business School. Our objectives are to find the elusive case law where we can see a proven ROI on social, and so draw conclusions for the industry about how to best measure and deploy social in its many guises as effectively as possible.

As well as rigorously tracking down and evaluating robust case studies, we’re publishing this Guide to represent our learning to date, the lay of the land as we see it today, including emerging best practice.

Stephen Maher  
Chair of #IPASocialWorks  
CEO MBA  
Chairman of The Marketing Society

## Authors

### #IPASocialWorks Cases

A team led by Fran Cassidy has been collating a large number of case examples from the UK and around the world, subjecting them to peer review, in order to identify those that show the effectiveness of social and which highlight the use of robust evaluation. The collection of case studies is growing all the time and can be accessed from the IPA website at:

[#IPASocialWorks >](#)

### The Guide

Led by Ray Poynter, Fran Cassidy and Simeon Duckworth, a team of specialists have put months of research into this guide, also inviting contributions from academics and practitioners all over the world, to create a hub of best practice in social media measurement. This Guide is the first published iteration of this project. An expert version of the Guide, for those already advising on social media and working with social data measurement, is also available at:

[The Expert Guide to Measuring Not Counting >](#)

This gives more detail on up to date viewpoints and current best practice.



#### Ray Poynter

The Future Place

Author of The Handbook of Online and Social Media Research and The Handbook of Mobile Market Research, the founder of NewMR.org, and the Managing Director of The Future Place.



#### Fran Cassidy

Cassidy Media Partnership

Fran runs an independent marketing and research consultancy specialising in on line and off line media, the entertainment, and the marketing services industries. She works across Europe and the US and has experience as a client, in agencies and as a media owner. She is also a Board Director of The Marketing Society.



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## Foreword

Social media marketing has come through the usual hype cycle and is now well established within the marketing armoury, although it's still developing and its role is still emerging.

Or, rather, roles: like other digital media, social can be used in many different ways under the broad headings of marketing communications, customer insights, customer experience and relationship management. It will take time for marketers to learn how best to exploit it under each of these headings.



Patrick Barwise  
Emeritus Professor of  
Management and Marketing  
London Business School



This Guide focuses on the first category - the use of social media in marketing communications - although it also touches on the others. (Categories and distinctions in marketing are rarely clear-cut). The potential is obvious: social media has achieved huge global penetration and usage, and as marketers we naturally like to reach customers and prospects via all the media they use, provided we can find the right ways of doing so.

The potential is even greater today than five years ago, not only because of increased penetration and usage but also because of the parallel growth of the mobile internet: we can now reach consumers whenever we want and wherever they are and we also increasingly know where they are, when, as well as who else they talk to, when, and about what.

All this raises some big challenges. Clients need to know that money spent on social is delivering value. This means measuring impacts and outcomes, not just counting clicks, likes and interactions. Like the internet 10 years ago, social media marketing is now coming of age.

Measuring social is hard because:

- It needs to work in combination with other channels and activities.
- It is dynamic and interactive, which raises a number of measurement challenges.

- Social media campaigns can have many different aims.
- Campaign budgets tend to be smaller than those used for other types of media, such as TV, although larger ones are appearing and measurement approaches need to reflect this diversity.

On the plus side, like all digital media, social can generate a lot of data at little or no incremental cost and lends itself to the test and learn approach traditionally associated with direct marketing.

As the importance of social grows, along with the resources allocated to it, there is a growing need to evaluate social with the same rigour as that applied to more traditional channels, and increasingly with metrics that take an integrated, as opposed to channel-specific, approach.

This Guide is well timed to take stock as social media for marketing communications come of age. It summarises the current state of play and offers guidelines on how to make the most of this young but rapidly maturing medium, based on and illustrated by some great case studies. I'm not aware of any other publication anywhere that addresses these issues so comprehensively.



## Seven Key Messages

Use of social is still in its infancy and social tools, data and methods are fast-changing. Currently, there is no one best approach to measuring social activity. We are still learning. This Guide marks a moment in time, and a step on a journey. However, seven key messages have emerged from the project to date.

# 1.

### Social is more than marcomms and is challenging organisations

Social is helping to bring the voice of the consumer to the heart of the organisation. Not only is it broadening the definition of media, but it is also blurring the traditional lines of responsibility for marketing and insight. It is operating as a communication channel, a service delivery platform and a source of insight. It is challenging the concept of a campaign with a clear start and end, as it is always on. For many organisations social data sets are now becoming part of their company-wide digital transformation. However, this can bring with it challenges for creating the sorts of reliable data sets suitable for accurate, predictive and attributional modelling. It is also shifting the balance of the organisation from collecting data to interpreting and analysing signals from multiple sources.

# 2.

### Social is changing the way we measure – its evaluation is more than a dashboard

Social is a new and powerful source of insight for advertisers. For evaluation, it provides new ways to understand not only 'what' happened but 'how' and even potentially 'why'. Beyond generating new metrics, social is also changing the nature of measurement. Because its feedback is real-time, the evaluation process is being integrated with each stage of campaign management from strategy, targeting, content development, delivery and evaluation. Increasingly, faster learning will require a greater emphasis on predictive benchmarks and testing and not just metrics and dashboards. This 'always on' aspect should force organisations to adopt a much broader culture of test-and-learn than is currently evident, increasingly in collaboration with external data partners, agencies and platforms.

# 4.

### It is easy to overestimate the value of earned media and influencers

Accurately measuring causality for earned media is hard. Even with some of the most sophisticated statistical techniques, it is easy to see a causal link when in reality there is only correlation. Another reason to cultivate a broad 'test and learn' culture

# 6.

### Social can learn from traditional planning

Social may be new, but the planning process is not, and the best way to make use of the new opportunities presented by social is to ground them in what is already known about campaigns and other communication activity, e.g. linking to objectives, based on clear assumptions, using comparable metrics. Social needs to adhere to the strategy and planning disciplines used across other marcomms activity and to be designed in from the start, not added retrospectively.

# 3.

### Avoid a siloed approach to social measurement

Social tends to work in conjunction with other media. It cannot be measured in isolation. Social needs its planning and evaluation to be integrated with other channels in order to maximise its benefits, establish its value, and be more trusted as a mainstream option. Further, in the majority of cases, the success of owned and especially earned tends to be a product of paid and interaction with other media. The learning objective for social evaluation is to understand how it works with other marketing at all stages of the consumer journey.

# 5.

### The commercial value of social will increasingly lie in the richness of its data

Current methods of collection and analytics are not fully mature. Two areas in particular have further potential: sentiment analysis and Social CRM. Sentiment analysis will never be 100% accurate, but improvements in algorithms and data collection, will allow the signal to be stronger and more reliable. For Social CRM, given the potentially clearer value exchange for customers in offering personal social data, these data sets could be part of a gateway into much richer insight across an organisation.

# 7.

### Even short-term results need a long-term context

One of the benefits of social is that it provides measurements that allow campaigns and activities to be optimised in real-time. However, the management of campaigns should balance long-term success with short-term success, since they tend to depend on different elements and strengths. The IPA has shown that key factors such as profitability and loyalty result from long-term effects, not simply cumulatively from short-term successes.



## Section 1

# Defining and Using Social

- 1.1 The evolution of social
- 1.2 Social Media and the POEM Framework
- 1.3 Marketing approaches to social
- 1.4 The role of social in marketing campaigns and activities
- 1.5 Integrating social into the communications planning process
- 1.6 Identifying how social works
- Case Study – Department for tourism, Philippines
- Case Study – ASB Bank

Like many phenomena, social is hard to define, but easy to recognise. Key features that are at the heart of social are:

### Interactive and social

Users of social can share, like, link, create, amend, and connect with the material and with other users, i.e. there needs to be a peer-to-peer element.

### Digital

Whilst there has always been social, in the context of this project the focus is digital.

### Attributable media

Not all social media is attributable, but social is accepted as a highly measurable form of media. Attributable media means it is often possible to determine who saw what, who interacted with what, and what they did next.

## The evolution of social

When social media first burst onto the scene, with networks such as MySpace and Friendster, it was a distinct sector and one that created ambiguity about how it would be financed in the medium and long term. Since then there have been three major developments:



### Adoption

The adoption of social by a wide range of sites and services (for example news services, travel, and retail), seeking to get people to share, like, post, and co-create.

### Movement

The movement towards mobile is shaping the way social is being used, particularly in the context of SoLoMo, the combination of social, location (e.g. GPS and beacons), and mobile.

### Creation

The creation of ad platforms that leverage their social members.

## Social Media and the POEM Framework

Social is often described in terms of the POEM model, which stands for Paid, Owned, and Earned Media (Corcoran, 2009). Each of the elements of the POEM model creates specific opportunities and challenges.

### Paid Media

Paid media is the most traditional of the three types of media and refers to more than just social media. **Paid media includes:**

#### ADVERTISING:



### Owned Media

Owned media means owned by the client, for example a corporate website, Facebook page, or Twitter account. Brands vary massively in terms of the scale of their owned media. Some brands have access to very large communities on platforms like Facebook, Twitter, and LinkedIn.

In December 2014, Coca-Cola had about 2.5 million Facebook fans from the UK and 93 million globally.

Owned media includes other media owned by the client, including campaign sites, competitions, apps, as well as older forms of owned media such as magazines and newsletters. Although owned media is sometimes referred to as free, it still incurs the costs of time and effort. The materials shared via owned media cost money too, and there is the substantial capital cost of having owned media.

Coca-Cola

2.5  
Million  
UK Facebook fans



93  
Million  
Global Facebook fans





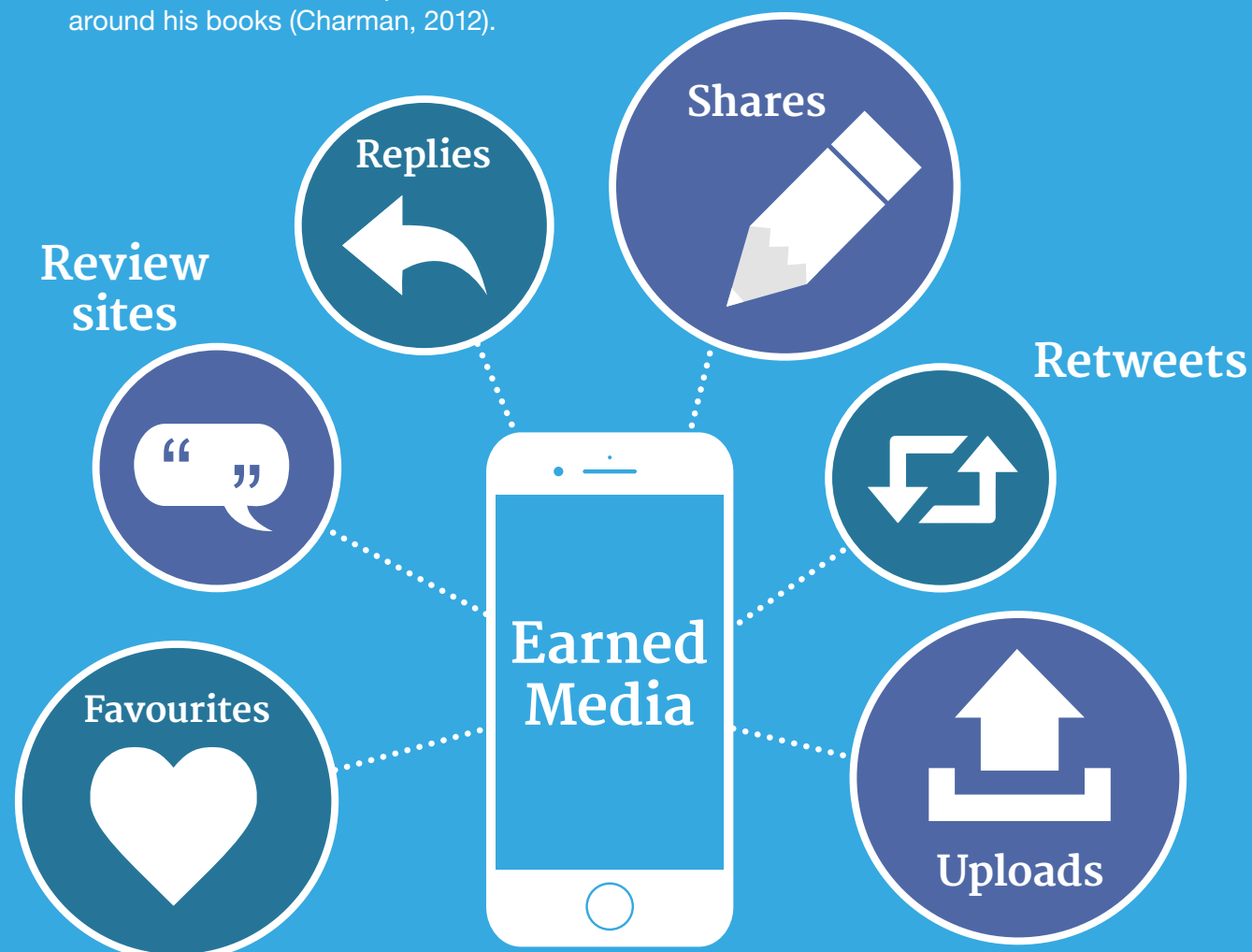
## Earned Media

Earned media refers to material that is shared or distributed by people who are not being paid for what they are doing. In social media this term includes review sites, shares, uploads, replies, retweets, favouriting, discussions in forums and on bulletin boards. It is sometimes referred to as C2C – customer-to-customer, or peer-to-peer. The 2013 Nielsen Global Trust in Advertising and Brand Messages Report ranked earned media as the most trusted, followed by owned media, with paid media being the least trusted of the three. Interestingly, the trust levels reported for Europe are much lower for almost everything, compared with other regions.

One concern about earned media is whether it is genuine. There have been high profile cases where online reviews or blog posts that appeared to be from fans or neutral third-parties turned out to be paid placements. For example, author Stephen Leather has confessed to creating fake reviews on Amazon to help create buzz around his books (Charman, 2012).

## Converged Media

Converged media is where two or more elements of the POEM model are combined. This tends to bring the quality of the content to the fore, rather than just the number of people it reaches. The idea underpinning a converged media strategy is that if material is sufficiently interesting people will want to share it, link to it, add comments, etc. The paid or owned media is used to provide the resources for the earned media to utilise, and to generate sufficient interest to cause people to create earned media.



Whilst most traditional forms of marketing are amenable to being utilised via social, eWOM (e-Word of Mouth) and COBRA (Consumers Online Brand Related Activities) are more specifically associated with social.

### eWOM

Word of mouth (WOM) is as old as marketing and has long been considered the most powerful element in marketing. The digital equivalent is eWOM.

A simple example of eWOM might be a customer review section on a hotel website site, where the hotel seeks to create positive flows of information and advocacy from visitors to the site.

WOMMA (the Word of Mouth Marketing Association) draw a distinction between organic and amplified WOM. Organic refers to naturally occurring patterns of posts, links, shares, etc. Amplified refers to marketing campaigns created to utilise the mechanics of WOM. One key feature of eWOM is that it can be positive or negative, in contrast to most other routes which are only occasionally negative.

### Cobra

COBRA stands for Consumers Online Brand Related Activities. A COBRA can be as simple as persuading customers to view a video, through to uploading a picture of their new shoes/hat/meal to Facebook or engaging in an ongoing activity such as Sharpie's series of social media campaigns to get people to create and upload doodles in a variety of forms to a variety of sites, using Sharpie pens.

COBRA can also be thought of as comprising three elements: consuming, contributing and creating (Mutinga et al, 2011).

## The role of social in marketing campaigns and activities

The role of social in marketing campaigns and activities appears to fall into one of six broad categories:

### Telling deeper and richer stories

Social facilitates telling deeper and richer stories in a number of ways, by providing more space/time for a story to be told in its entirety, rather than fitting it to a conventional format. Allowing the story to expand over time, in response to reactions, suggestions.

Case Study : Visit Iceland / Mattessons Fridge Raiders  
[View >](#)

### Allowing real-time management of campaigns

Historically, the measurement of campaigns and activities was considered separately to the implementation and management of the campaigns/activities. Typically, measurement was used to evaluate campaigns after they had finished. With social, the measurement and evaluation can be integrated and the measurement process used to guide and influence the implementation.

Case Study : Cadbury's Creme Egg  
[View >](#)

### Monitoring and responding to discourses

The ability to listen to conversations taking place in social media creates a number of opportunities, including:

Gathering a 360 degree picture of the brand and its activities.

Sourcing of information about the activities of other brands.

Gathering inspiration and advice.

Checking for problems, underperformance and alerts.

Case Study : TfI / BT / O2  
[View >](#)

### Leveraging social behavior

One of the main strengths of social is, of course, that it can utilise social behaviour, for example to spread a message or promote an activity.

Case Study : ASB Bank  
[View >](#)

### Enhancing / amplifying other activities

Generally, the most effective way to use social is in conjunction with other activities, in particular to amplify the impact of other channels.

Case Study : Philippines Board of Tourism / Doritos  
[View >](#)

### Targeting customers

Social platforms can enable varied and better targeting of customers to increase efficiency. Examples of this include using geotargeting for mobile promotion, or demographic targeting.

Case Study : IKEA / Onken  
[View >](#)



## Integrating social into the communications planning process

In most cases, social is used in conjunction with other media, and in most cases its impact will be partly direct and partly through its interaction with other activities. This level of interaction needs to be designed into the campaign/activity from the outset and should be addressed by the evaluation.

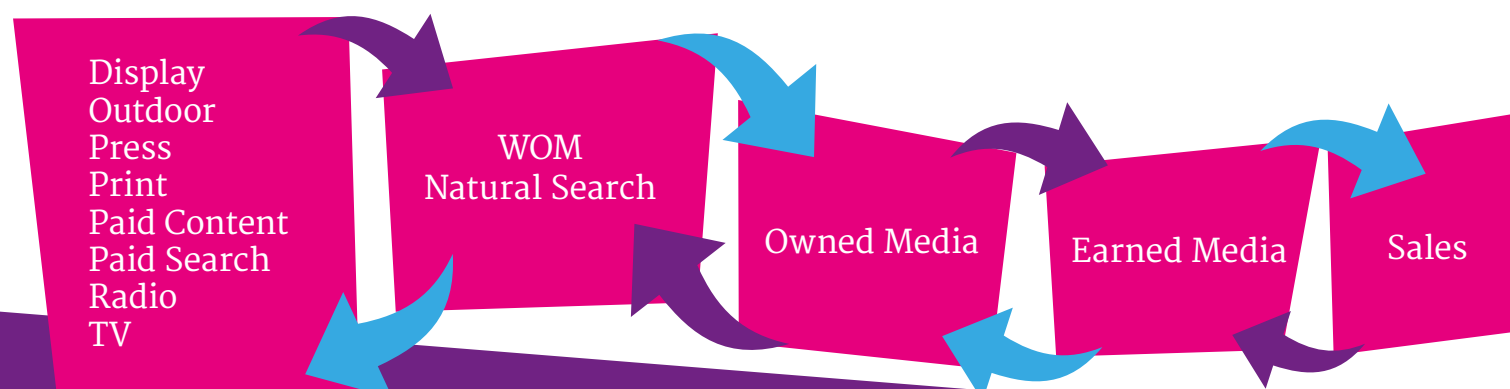
The measurement challenge is not only to evaluate the direct effectiveness of the social element – but also its role in amplifying other media. The sort of interaction that should be expected is shown in the diagram (Fig 1).

Social may be new, but the planning process is not, and the best way to make use of the new opportunities presented by social is to ground them in what is already known about campaigns and activities.

In this context, it is useful to think about the planning cycle and the role of short-term and long-term effects. Stephen King's Planning Cycle (Fig 2) can be very helpful in asking the key questions that marketers need to think about - not only in terms of their marketing communications activity, but also about the position of the brand as a whole.

In the context of social, as is the case for any media, it is important to be clear about the objectives and the role that social will play.

(Fig 1)



(Fig 2)



## Identifying how social works

As social media has grown, people have become more interested in how ideas propagate, through peer-to-peer networks and through mass media. In this context, the difference between influence and homophily is of particular importance.

For example, we might notice that if one person in a social network buys something, other members of that network also buy it. Dependent upon our belief about how social media works we might draw one of two inferences and design two very different marketing campaigns:



### Influencers

Some people are influencing others, so we should find and target potential influencers.



### Networks

We might assume that people with similar tastes would be connected to each other, in which case we should target people in that same network as they would have a greater propensity to purchase.



## Case Study 1: Department for Tourism, Philippines

A good creative idea can be amplified in the social space and can totally revive interest in a brand, especially if it allows people to show how creative and witty they are.

The Philippines had an image problem that prevented potential tourists from appreciating the positive appeal of visiting the country. Annual tourist arrivals had flatlined at below four million, one of the worst performances in the region. In 2012, a campaign was developed to drive tourism numbers and to make the Philippines, and the campaign, the most talked about, shared and searched for in Southeast Asia. To make up for the lack of marketing funding, the campaign relied on crowdsourcing the creative work taken from an initial idea:

### “It’s more fun in the Philippines”.

This captured the idea that the Filipino people enhance the experience of any tourist. And, through harnessing the power of social media, 95 million Filipinos were transformed into a creative tourism sales force.

The campaign became the number one global trend on Twitter just two days after its launch, with the slogan mentioned online once every minute. The Philippines achieved a 231% increase in Google hits for the country, while tourism arrivals hit an all-time high of 4.3 million, an increase of and 9% exceeding the target of 7% (source: Philippine DoT).

The campaign brought in more additional visitors than tourism powerhouse Malaysia, despite having a far smaller marketing budget. It is asserted that the campaign was amplified by social media and over 60,000 suggestions for “It’s more fun in the Philippines” were created across the world. By making it easy for Filipinos to grasp the campaign and take part in it, these thousands of memes were inspired by user-created ‘ad-maker’ sites, and iPhone, Android and Windows apps. Individual ideas covered the entire spectrum of subject areas in the tourism promotion master plan, later forming the basis of promotional posters, print ads and even a global TV commercial – entirely from crowd-sourced ideas.

Interestingly, the tourism levels did not slump after a major typhoon hit the islands in November, despite widespread global media coverage, but continued to rise and is targeted to reach another an all-time high in 2014. For more information see the video case from the Spikes Asia award entry.

Aside from the increase in tourism volume, the average daily expenditure went up to \$101 a day in 2013 from \$92 in 2011. Also, length of stay increased to 9.6 nights in 2013 from 8 nights in 2011, resulting in higher gross receipts and bigger contribution to GDP. Direct contribution to GDP from Tourism reached \$11.1bn – a 7.8% increase from 2012.

[View >](#)

95<sub>M</sub>  
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1  
Mention  
per minute  
online

Global  
trend  
on Twitter in just 2 days

+231% Increase in  
Google hits

+7.8%  
Increase  
in Tourism’s contribution  
to GDP – Now \$11.1bn

9% Increase  
in tourism arrivals



# Case Study 2: ASB Bank

Social can work for short term sales promotion. Customers and potential customers will share a powerful idea with clear value.

ASB is a New Zealand bank whose share of the home loans market was under pressure from competitors, driving down the rate in a very commoditised market. The bank wanted to challenge the market and chose social activity to do this. Its objective was to convert its social media activity from being a complementary service channel to a revenue generator, by building a database of warm home loan leads to convert. ASB created the concept of the 'Like Loan'.

The principle of the 2013 campaign was that, as more visitors 'Liked' ASB on Facebook on a given day, ASB lowered its rate. One winner would then be offered the rate the number of likes 'created'. This was repeated over four weeks. The bank reports that the campaign created 17,778 leads, of which 11,555 were new customers. This campaign won a Gold award from Warc in 2014. At the point where ASB submitted the campaign to WARC it had already converted 229 of the leads into loans and the return on the campaign ran into millions of dollars.

The campaign was run again in 2014, adding TV to the mix.

[View >](#)

+17,000  
Leads Created

Including 11,555 New Customers



Gold  
Award  
from WARC



229  
Converted  
Leads into Loans



# Perspectives 1



For decades, data has been the key to unlocking secrets about people: their preferences, behaviour and habits. What has changed are the parameters by which people can be understood through this data. When we started out the best data was from the Census, so it was a case of, 'you are where you live'.

Edwina Dunn  
Co-founder of dunnhumby  
& CEO of fan science company Starcount

Then with shopping basket data it was 'you are what you eat'. Now one of the most important sources is social media and the paradigm that often interests us is 'you are who you follow'.

Social media has so much potential to deliver a new level of insight, because you are dealing with brands which people care passionately about. This isn't about what people buy but what they love and how they spend their spare time.

Celebrities are often the fuel behind social networks, the brands and stars that people are interested in.

The future for social media is to find new ways to connect fans and followers to the people and things that they are interested in. Relevance remains the most important asset in customer relations, and the most successful organisations will be those who understand this and tailor their services to each individual's unique needs and interests.



## Section 2

# How to Measure Social

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- 2.1 Establishing expectations and a framework
- 2.2 Planning ahead
- 2.3 Being SMART
- 2.4 Distinguishing between efficiency and effectiveness
- 2.5 Integration with other elements of the campaign
- 2.6 Continuous measurement versus ad hoc campaigns
- 2.7 Advertising compared to Customer Experience measurement
- Case Study – BT
- Case Study – Doritos – Mariachi
- Case Study – Kerry Foods / Mattessons

Measurement does not just happen; it requires a framework, it requires planning and it requires the selection of the right metrics. The measurement of traditional media has been developed over decades and has been subject to a high level of testing. By contrast, social is relatively new and highly dynamic, which means that there are few established rules and practices.

Because social is less well developed, there is a greater need to design a specific measurement strategy. Most social campaigns and activities operate in conjunction with other media and this factor needs to be an integral element of any evaluation.

## Establishing expectations and a framework

The expectations and framework should define the goals of the campaign/activity and be aligned to the business objectives.

Because social is seen as undeveloped and evolving, campaigns are often undertaken because there is a perceived need to 'be doing something'. Even in these cases targets and predictions should be created, to allow the campaign or activity to be adequately assessed.

Benchmarking and targets are key to the evaluation of social media campaigns and activities. Few social media metrics mean much outside their immediate contexts. It is hard to interpret the meaning of achieving 50,000 'likes' or generating a few thousands tweets, but at least when you are

able to compare these numbers to 2,000 or 2,000,000, you will have some context for the comparison. As the IAB have said, "Without comparative benchmarking most metrics are completely meaningless."

The use of KPIs requires a target, which should be set in advance. Benchmarks are common method of setting targets, but other methods can also be used, for example forecasts based on market mix modelling. The key feature is to set realistic expectations and performance measures.

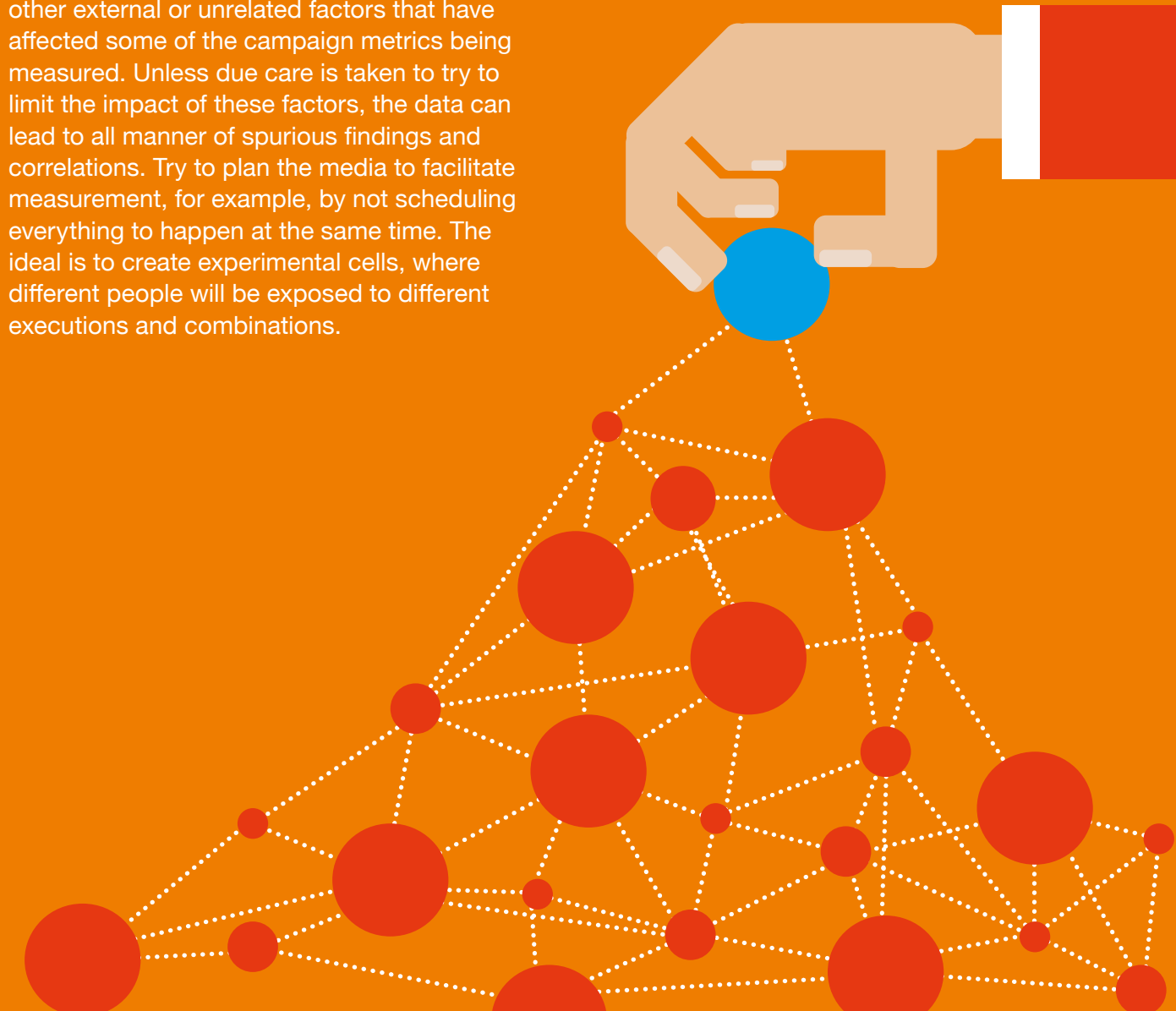


## Planning ahead

As with any measurement of campaigns or marketing activities, the campaign's objectives and the items to be measured must be set before the campaign starts. Specifically, the metrics need to be identified and the methods of collecting the data should be agreed.

It is likely that social media data from earlier time periods will be available and it is tempting to wait for the campaign to start or even be finished before looking retrospectively for evidence it has had an impact.

This is flawed and will often lead to the wrong interpretation. It is likely that there are other external or unrelated factors that have affected some of the campaign metrics being measured. Unless due care is taken to try to limit the impact of these factors, the data can lead to all manner of spurious findings and correlations. Try to plan the media to facilitate measurement, for example, by not scheduling everything to happen at the same time. The ideal is to create experimental cells, where different people will be exposed to different executions and combinations.



**Being SMART**

The evaluation process should embody a SMART approach, i.e. Specific, Measurable, Achievable, Relevant, and Time-bound. The evaluation should not confuse objectives with metrics or KPIs. The objectives are what the campaign or activity is aiming to achieve.

**The Metrics**

The metrics/KPIs are measurements that should indicate the extent to which the campaign's objectives are being met. It is important to recognise that there is no single best metric and that the ideal metrics for the last project may not be suitable for the next project.

Select measurements that are quantifiable, facilitate action, and linked to business outcomes. One key element in making the metrics useful (for both action and evaluation) is to limit the number of KPIs, ensuring they are easy to understand and efficient to collect.

Set aside time, budget (perhaps 1% to 2% of the campaign spend, or 5% for smaller projects) and resources for analysis. There is a perception that the data from social is free. Whilst the acquisition of data is sometimes free (and sometimes not), the proper analysis of the data takes time and money.

**Investigate what analysis options are available from the platforms and providers. Look beyond just pre-post.**

This is particularly relevant for social activity as it is often, of course, 'always on' – so a start and end date is less obvious than it is in traditional media.

Look for relationships over time, using data from before, during, and after the campaign/activity. Think about other factors, such as: seasonality, homophily (the tendency of individuals to bond with people similar to themselves), other brands, other campaigns and ongoing activities.

**Efficiency**

Efficiency is a ratio approach, typically with the desired outcome (e.g. sales, leads, registrations) as the key number, and the cost (e.g. money, resources or time) as the base. Efficiency is, in effect, the same as one of the measures of (Revenue) ROI.

**Effectiveness**

If you obtain £4m of value for a spend of £1m, then the efficiency/ROI is four million over one million, or four. Effectiveness is a measure of how much the activity delivered.

In the example above, the effectiveness would be £4m (or alternatively, £4m minus £1m, i.e. £3m if the organisation includes costs in their calculations). A good campaign is both efficient and effective.

## Integration with other elements of the campaign

Whilst some social campaigns or activities are 'pure play' (i.e. they are only social) many are part of a broader picture, utilising a number of channels. Where social is being integrated into a broader campaign the evaluation needs to operate at three levels:

THE IMPACT OF  
of the social media.

THE TOTAL IMPACT  
on the overall campaign.

CONTRIBUTION OF SOCIAL  
to the total picture.

The third element in this process usually employs an attribution model or market mix modelling.

The metrics for social have two roles, the first is to help optimise the campaign, and the second is focused on evaluation and measuring. Some metrics will be used for both roles, others will be chosen for just one role.



## Continuous measurement versus ad hoc campaigns

As with other marketing activities it is possible to conduct continuous measurement and/or measurement targeted at specific social campaigns/activities. The key issues for these two types of measurement are:

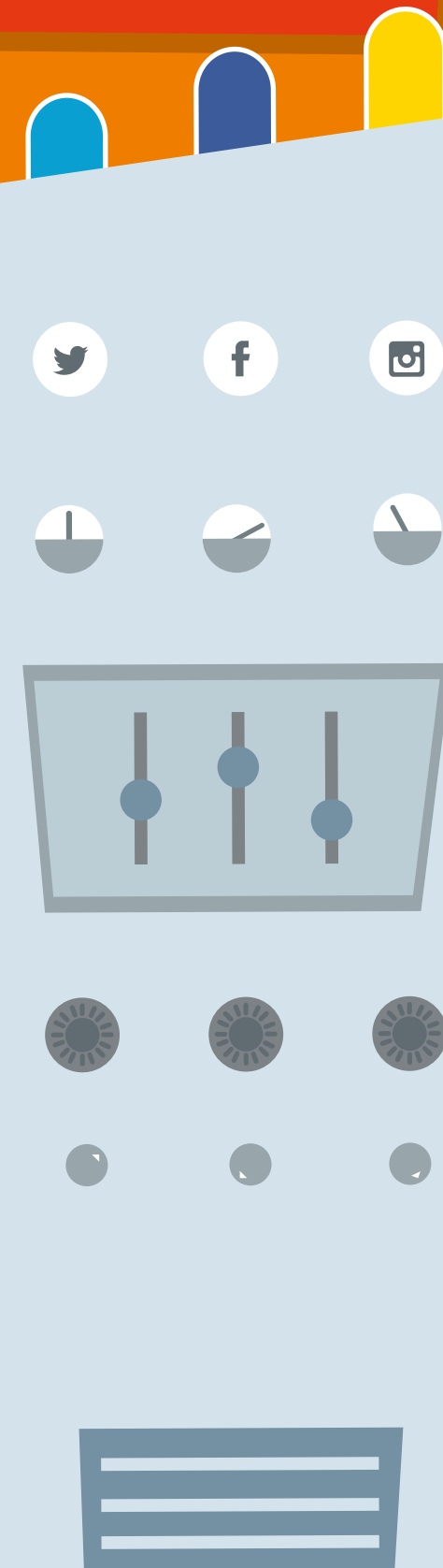
### Continuous metrics

Continuous metrics should seek to measure expected changes and at the same time have the capacity to pick up unexpected changes and effects. One example of a metric that can help identify changes that were not expected is sentiment.

### Ad hoc campaigns

Ad hoc campaigns typically require that the key outcomes are identified in advance. Once the key outcomes are identified, baselines can be created. In some cases the objectives might need to be tweaked to ensure that the results are measurable.

One similarity between continuous and ad hoc campaigns is that the real-time and granular nature of social media measurement means that the management of campaigns can often be tweaked or amended in light of social media feedback.



## Advertising compared to Customer Experience measurement (outgoing versus incoming messages)

The measurement of an activity, an advertising campaign for example, will focus on the goals the campaign was designed to impact, plus the measurement of core brand/organisational attributes. By contrast, the measurement of incoming messages relating to service provision and the general social media buzz about the brand needs to be more open-ended.

### Incoming Messages

The measurement of services and general buzz will often include the number of people talking about a brand in social media (PTA), sentiment analysis, reviews, and referrals. The BT case study quoted provides a good example of how service delivery and social can be integrated, how they can be part of a wider campaign, and how they can be measured.

It is important to note that customer satisfaction measurement by social is a developing field and needs careful analysis. Twitter, for example, may achieve low scores for initial satisfaction, because it can be used as a complaint route. Customers who are unhappy and who tweet can, of course, be converted to brand champions if handled in the right way, but the conversion may not be handled or expressed through the same channel and therefore the channel's effect may be misattributed.



### Case Study 3: BT

Use of social channels in customer service can make that service easier, cheaper and quicker to deliver for the brand and more effective for the customer – improving loyalty and overall returns. Since 2009 BT has been developing a multi-faceted social approach, including:

#### Social Monitoring

A social monitoring tool (Debatescape) to listen to what customers are saying about its service experience and the brand.



#### Customer Service

A customer service team to proactively and reactively offer help to customers complaining in the social web.



#### Embedding Social

Embedding social media activity within call centres, using trained, existing technical help advisors.



#### Social Presences

Setting up social media presences in the places where conversations are taking place, using Twitter to enhance communications and creating opportunities for self-help and community support.



BT divides its metrics into Soft (e.g. Facebook likes, followers on Twitter, positive mentions, views on YouTube, etc.) and Hard (e.g. customer satisfaction, customer effort, likelihood to churn and call deflection).

The calls deflected, for example, show impressive returns. Over the time period measured (12 months) Twitter deflected 38,023 calls, saving £98,000; YouTube deflected 55,000 calls, saving £72,000; and the Forums deflected 504,000 calls, saving £942,000. The ROI model has been built on volume of contacts, unique customers, effectiveness (full resolution of query) and cost of contact.

In 2013 BT stated that the lower effort, lower cost, and positive brand impact have resulted in a £2 million saving.

In terms of satisfaction scores, BT has revealed detail of the initial impact after the inclusion of using social media to offer customer service. A comparison of three month rolling average satisfaction scores revealed that in October 2010 the score was 63% and by Oct 2011 this had improved to 87% (a 37% increase).

BT identified that 'ease' of customer service was a factor in reducing churn and also had positive effects on customer loyalty and advocacy which could help it grow in new areas. BT asked the question "How easy was it to get the help you wanted from BT today? Effort became therefore a more commercially effective metric to track than the 'Net Promoter Score' used by many other organisations. So BT developed a "Net Easy Score" instead. And use of social media was clearly seen to be driving the Net Easy Scores higher.

See the full case study on [the IPA website](#).



## Case Study 4: Doritos – Mariachi

A good social idea can work to widen the appeal of a youth targeted brand without alienating its core, especially if the idea is promoted via channels with wider reach.

In the last five years, Doritos had targeted a youthful audience of 18-24 'socially active snack consumers' and the brand has grown in value to become the third biggest in the UK crisp and snacks category (Nielsen). The brand decided it was time to focus on consumers outside of its heartland for the first time, 25-44-year-olds, and created a business objective of increasing value sales by more than 6%.

**Doritos had been positioned as the perfect snack for social get-togethers with friends. However, the new target was to create a role for Doritos in any social occasion, with any consumer audience.**

Given that Doritos is a tactile, informal snack the brand team felt it could position the brand as a way of breaking down formality and awkwardness. It expressed this as the brand proposition: *Doritos breaks down formality and gets you in the mood to party.* Its solution came in cheesy pop cover songs. Research revealed these songs had universal appeal. The idea was to create a cheesy covers band 'Mariachi Doritos' that captured the spirit and fun of the Doritos brand, and acted as a metaphor for the role Doritos could play at any party to break down formality and help people let their hair down.

The band appeared at social occasions up and down the country in real people's living rooms, real people's dinner parties, birthday parties and BBQs. The aim was that customers experience the brand as part of an all-year-round campaign.

High-performing content was pushed harder through all social media channels. The criterion was that if content performed well within three hours (past a 2% virality benchmark) then it would be amplified to wider audience. People were driven to the campaign hub from other social channels (including Twitter and YouTube), as well as from TV, and fans and non-fans of Doritos could go to the Facebook page and sign up to 'join the tour'.

While TV played a role, its role was to drive awareness and interest in the social media tour, and the belief was that this approach would be much more cost-effective than a traditional TV-only approach.

As well as engaging consumers, they also created Mariachi Doritos content tailored to Doritos retail partners as an entertaining way of thanking them for their support and encouraging them to give Doritos future preferential display in store.

[View >](#)

OCRs (Nielsen Online Campaign Ratings) and Nielsen Brand Effect were used to measure the performance of the social media content and for the first time to help the brand understand the impact of social media on purchase intent, brand likeability, etc. 'Soft' brand measures moved positively, including purchase intent and recommendation intent, and sales for the brand increased by 11%. At the time of writing about this case, no modelling or other data has been supplied to suggest any attribution by channel for the sales increase. However, these results and the overall innovative approach by the brand has meant the case has been awarded the Grand Prix in WARC's 2014 Prize for Social Strategy.





## Case Study 5: Kerry Foods / Mattessons

Use of social channels in customer service can make that service easier, cheaper and quicker to deliver for the brand and more effective for the customer – improving loyalty and overall returns. The effect of social can be modelled when enough base level data has been collected when the number of channels and activity used are limited.

The Mattessons brand Fridge Raiders (flavoured chicken pieces) from Kerry Foods was experiencing a decline in sales and needed to widen their target market (in terms of people or situations) to reverse this. Their existing market was teenagers and, of course, mums buying for those teenagers. After a research study was conducted, one of the key insights was that the product did not have a specific 'eating occasion'.

The brand decided to focus on post school as the 'eating occasion' and to use gaming as the vehicle into it, positioning the product as the 'ultimate gaming snack'. They teamed up with an online gaming celebrity, who had three million subscribers, 400,000 Facebook fans, and 570,000 Twitter followers. Together they invited the celebrity's audience to design the 'hands-free snacking device', which was then chosen, made and delivered to the celebrity's home. Base sales from social media increased by 20% and market mix modelling demonstrated that the ROI achieved was £2.44 per £1 spend, measured over one year. A video version on the case study can be seen [here](#). Note, the sales uplift stated in the video also included value from a promotional offer in store but the modelling demonstrated a 20% uplift from the social element.

Read more via [the IPA website](#).

Celeb   
Online gamer team-up

 £2.44  
ROI from £1

+20%   
Impact on sale  
from social Media

## Perspectives 2



There is little doubt that social is already having a big impact on our business. It is one of a handful of major, inter-connected forces that are fundamentally reshaping both marketing and marketing research practices.

Stan Sthanunathan  
Senior Vice President  
Consumer & Market Insights  
Unilever

Social provides us with new, powerful ways to connect with the people who buy and love our brands and deepen their experience. But it also changes the competitive dynamic. So brands such as Chobani, in the USA, can quickly build sizable market presence cost effectively by understanding demand and creating word of mouth. Yet, we believe that the impact of social on research has only just begun. The potential is certainly significant.

It is effectively a new form of ethnography that allows us to understand the people who most care about our brands and the issues that touch the categories they operate in. Done well, it can be just in-time, truly scalable research. However, few of the many tools currently available have the rigour to fulfil this potential. In time, social will not only shape what we do as research professionals, but how we do it.

Market research and marketing will progressively converge as data collection becomes part of marketing and interpretation

of numerous, often messy and ambiguous data streams, becomes more central to adaptive planning. This convergence across data streams, analytics and decision tools will require a profoundly new model of how we work with agencies. Above all, we must commit to shaping the future, not just following trends. Understanding that social drives business value will, of course, be critical. But we must be wary of hiding behind the demands for demonstrable ROI for innovative approaches if it forces us to be followers - not shapers - of the future. In this rapidly evolving field, the need is to have a perpetual beta mind set, combined with a heavy dose of curiosity and inclination to take risks.

**Remember: If you do the same type of research expecting to gain deeper insights, this is one definition of the height of optimism.**

## Section 3

# Five Point Plan for Baking Measurement into Social

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- Case Study - O2
- Case Study - Transport for London
- Case Study - Visit Iceland

To properly evaluate social media marketing and activities, the measurement process should be designed in from the start. Waiting until the end of a campaign to determine how to measure the campaign can fail either because the right data has not been collected or because there are simply too many possible interpretations of what happened.

## Five Point Plan for Baking Measurement into Social

The #IPASocialWorks team has generated a five point plan to help ensure that measurement is baked into social campaigns and activities. Note, these are not five linear steps. Organisations and their uses of social, are very varied, so different projects might enter the process at different points and may travel through the list more than once to ensure that the opportunity to evaluate the campaign is maximised.

1

### What is the campaign/activity designed to do?

How does this link to the wider business or organisational needs? While not all social campaigns are intended to link directly to broader business objectives, it is important that there is a series of links, model or hierarchy of effects that can trace the investment back to value for the business.

List the macro and micro objectives. Macro objectives tend to be business objective such as sales. Micro objectives relate to how the campaign is intended to work, such as downloads, registrations, or sharing. Each needs to be covered by relevant metrics.



2

### Why social? What is the role of social?

Is it being used on its own or in addition to other components? Which channels and content are going to be used? Including a consideration of the role of Paid, Owned, and Earned Media.

List the channels to be used. Paid and owned media channels tend to be self-evident, but earned media can be quite wide.

3

### What decisions will be made on the strength of the evaluation?

- Are the metrics to be used at the end of the campaign to assess it, or are some to be used dynamically during the campaign/activity to manage the implementation?
- How would these decisions be made otherwise?
- How much resource should be invested in evaluation?

The decisions drive the selection of metrics, and the timing of the decisions is a major factor.



4

## What are the most appropriate datasets and metrics?

How will they be collected? The key considerations are:

### Audit Metrics

e.g. what was sent out and who was reached, including virality.

A

### Resonance Metrics

e.g. engagement, attitudinal, customer satisfaction and reputation effects.

B

### Response Metrics

e.g. sales, customer acquisition, and other calls to action.

C

### Metrics that differentiate between the channels and between social and non-social components

e.g. TV and Twitter, Search and Social.

D

For each metric, use historic data to form a prediction or target for what you expect the activity to achieve. As ever, KPIs should be SMART – Specific, Relevant, Attributable, Relevant & Time-bound. Create a matrix of what is possible with the objectives and decisions, to determine an optimal set of metrics. Small enough to be manageable, large enough to cover the needs.

5

## Designing the evaluation process

Determine how the data, metrics, and objectives are going to be analysed to measure the incremental effectiveness of the campaign or activity. Plan for actionable granularity & learning. Evaluations should ideally measure not only the incremental impact of the campaign but how success can be repeated. Because measuring causality for social can be complex, plan in media and content tests and also how they will be evaluated.

Design the evaluation, including the method, budget, timing, and reporting. With social an integrated dashboard showing real-time feedback is often expected. But this step should also include the potential for 'test and learn' approaches as the campaign continues – or 'adaptive planning'.



### Step 1 & 2

Steps 1 and 2 help determine the nature of the campaign and the balance between the channels, for example how much of it will be social, and within that what specific channels are going to be used. Steps 1 and 2 should also generate the hypotheses that the evaluation will seek to test and evaluate.

### Step 3

Step 3 determines the priorities and timeliness of the reporting.

### Step 4 & 5

Steps 4 and 5 determine what will be collected and how it will be analysed.



## Case Study 6: O<sub>2</sub>

Social can be a great channel for customer service delivery. There is an expectation now for many brands that they will respond quickly, especially in crises, and this level of response is rewarded with loyalty and higher customer satisfaction scores.

O2 is a leading digital communications company in the UK, with over 23 million customers. The brand realised that social media data was a valuable source of consumer insight, and that social channels would be key to cost effective customer service.

O2 partnered with social intelligence agency, Face, to develop its own platform which it called RTO2 (Real-Time O2). RTO2 was launched in 2010 across the O2 UK business with over 400 users.

RTO2 enables O2 to monitor and instantly react to messages directed at the brand on the social media channels where it has a presence.

The platform collects the messages and augments them with 'meta data' to add contextual information which is extremely useful in customer service decision making. For example, the system collects: sentiment, customer influence level, customer location, customer history, service area & type of issue.

Using social data in this way enabled the newly formed Social Media Response team to prioritise messages by topic, negativity or influence level and ensure their replies takes into account all previous social interactions with that customer. RTO2 provides a real time reporting dashboard, with the following metrics: Response time, % Issues resolved, Team member activity, Incoming and outgoing messages, Messages by channel, and Messages by service area.

In July 2012 O2 suffered its biggest marketing and communications crisis ever, its network went down for over 10 million customers for a two day period. Naturally, customers took to social media to share their concerns, frustrations, and anger. Over 30 team members were assigned to respond to the surge in mentions. The ability to react to every mention as it appeared online significantly impacted sentiment surrounding the issue and overall brand perception. Because O2 could manage in-house much of the servicing of customers during this difficult period, using its social media systems rather than outsourcing the problem, its analytics system meant it could determine the amount of money saved per customer.



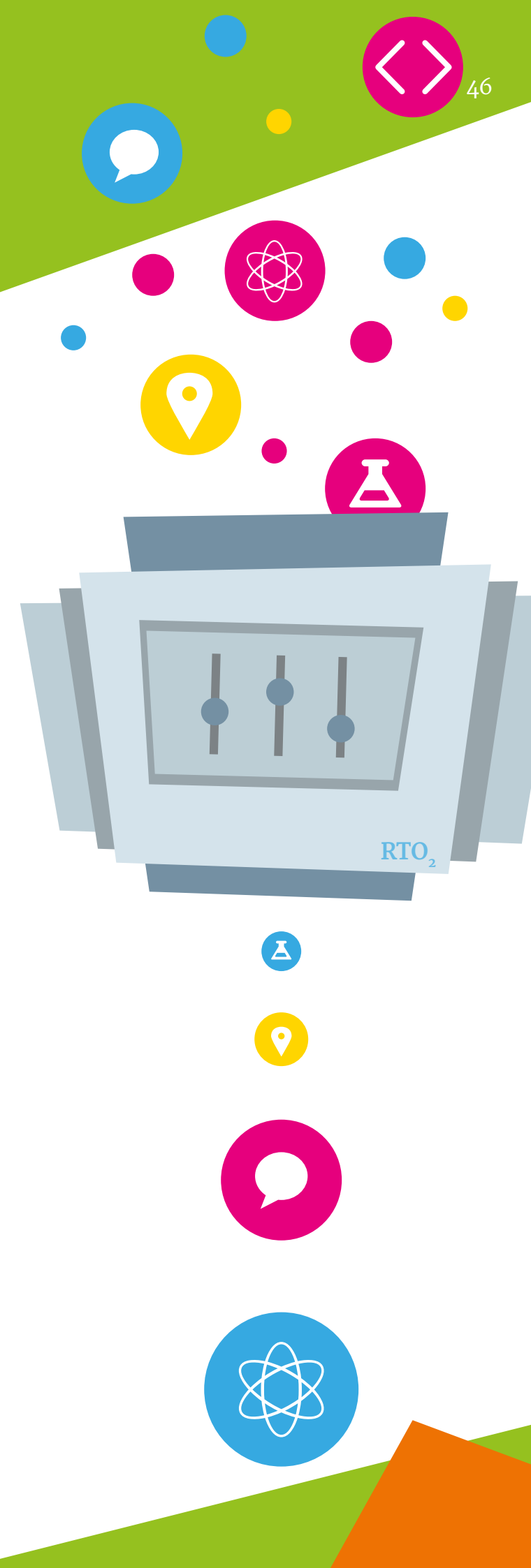
O2 uses its tool to analyse the reach of conversations arising from Marketing and PR campaigns, the brand's competitive position in the social media landscape, and to understand the role of influencers, particularly when targeting specific content areas.

Influence is measured in three main ways:

- 1) Who is talking about O2 the most?(Volume)
- 2) Whose mentions reach the biggest audience? (Visibility)
- 3) Whose mentions drive the biggest reactions from other people? (Engagement/Influence)

Influencers are also used for promotional offers. For example, a retweet competition was held for new handsets. O2 has calculated how much each point of customer satisfaction is worth in net profit per customer. Using this tool, it has started to establish how much social media interaction is worth: customers who have interacted with the organisation via social media deliver a customer satisfaction score of 73, whereas those who do not interact on social media deliver a score of 69.

Access the full case study from  
the IPA website.



## Case Study 7: TfL – Transport for London

Customer service is not only a quicker channel to respond to customers, but development of the ‘voice’ of the organisation helps to further the customer centricity of the organisation.

TfL (Transport for London) started using social media for broadcasting information in 2009. In February 2012 it started using it for real-time updates sent by humans (the original trials of automated updates were discontinued).

In March 2012 TfL started using social for Oyster customer queries and customer services. With increasing customer demand, TfL rolled out social media customer service across the board.

TfL had three key corporate objectives:

- 1) Make it easy for customers to interact with the organisation.
- 2) Provide real-time information.
- 3) Demonstrate that it cares about service and improve levels of customer satisfaction.

In terms of speed of response, TfL have found that Twitter is fastest, with queries serviced in one minute on average. That compares with average response times of 15 minutes for e-mail and letter, seven minutes for telephone and two minutes for Facebook. Given that one of the key metrics for TfL is ‘Lost customer hours’ speed is a key objective.

When developing its policy for social, the team found that the process of determining “TfL’s social tone of voice” really helped to bring the organisation together as there is not one department, but many, which, operationally, could ‘speak’ for the organisation in this way.

TfL’s content is a mix of standard updates, responses to individual queries, and pro-active tips. For example, on the day of the Jay-Z concert at O2, TfL tweets alerted followers to potential traffic issues. Customer satisfaction measurement revealed that social media customer service for Tube, bus and traffic achieved a 74% satisfaction score, and its Oyster feed a 71% score. There are, as yet, no comparatives, but TfL regards this as satisfactory given that the feeds often pass on bad news about delays and disruption.

Two-thirds of TfL’s social media followers have said that following TfL on Twitter has had a positive impact on their impression of TfL. However, TfL has yet to measure the impact of this on its overall satisfaction score.

Access the full case study from the [IPA website](#).

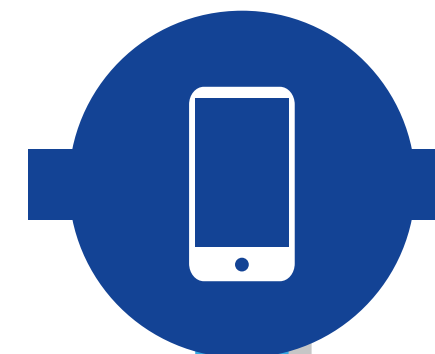
1  
minute



2  
minutes



7  
minutes



15  
minutes



## Case Study 8: Visit Iceland

Social can provide a powerful and passionate channel to bring vital stories to life and enable them to be shared on a global scale. In this case the combination of POEM worked seamlessly. The key metric was footfall into the country.

Visit Iceland, the Department of Tourism for Iceland, needed to make potential tourists rethink their impression of the country following the potentially devastating effect of both the financial crisis and the eruption of the volcano, Eyjafjallajökull.

The campaign encouraged Icelanders themselves, and then previous visitors to Iceland, to share their inspiring stories of the country. The agency created a variety of social tools to make it easy for people to do this and rewarded those that did so with events, such as unique concerts.

By measuring the footfall through the airport, the Department for Tourism calculated the effect of the additional visitors on the Iceland economy. Whilst there was a certain amount of additional media, such as print and outdoor, social was the lead medium and the idea was essentially social in nature. The stories created within the campaign were both rich and deep. It has been estimated that the campaign delivered a ROMI (Return on Marketing Investment) of 61:1 on a campaign budget of £2.24m.

Social was the lead medium and the idea was essentially social in nature.

Access the full case study from the [IPA website](#).

# Global scale



for sharing vital stories



ROMI of  
**61:1**  
on a budget of £2.24m

# Unique concerts

offered as rewards to share inspiring stories



## Perspectives 3



Social media is much more than a marketing channel. Social can fundamentally re-shape a brand's relationship with customers, introducing more transparency and interaction.

Jake Steadman  
@jakesteadman  
Head of Research EMEA, Twitter

Social media measurement is evolving in three key ways:

**Integration.** In the past, social media measurement often used different metrics to the broader business. CMOs would see reports that evaluated campaigns across traditional media using consistent KPIs combined with platform-specific figures for the social elements. The tools available to measure social media campaigns have evolved and teams have started measuring success using more standardised KPIs. Measuring retweets or likes is being replaced by assessing how effectively content has driven brand metrics like Awareness, Consideration, or Purchase Intent. This trend is accelerating, media teams are deploying more sophisticated (yet often more traditional) measurement tools with social channels. Social media measurement will increasingly be fully aligned with standardised brand and commercial KPIs, ending platform-specific reporting.

**Redefining Value.** Social media is much more than a marketing channel. Social can fundamentally re-shape a brand's relationship with customers, introducing more transparency and interaction. Social can help generate new customers and improve the service offered to existing customers. We are working with a growing number of brands to quantify the value that best-in-class customer service on Twitter provides for their business, in terms of cost

efficiency and brand attraction. There is a need now to measure everything that a social business represents. For example, the impact of great customer service, the value of additional trust rising from transparency, the impact of empowering staff to tweet and act as brand advocate. These will be actively planned, delivered, and measured as social media becomes more pervasive across organisations.

**Commercialising Research.** In the past, research teams were often separate from the commercial operation of a business. They looked after traditional research, but responsibility for analysing social campaigns often sat with separate teams. As researchers have embraced social media as a source of insight and installed new platforms to analyse it, they've started to become the barometer of a brand's social media presence. This is a huge opportunity for research teams to more closely align themselves further with the commercial side of their businesses and to advise on how best to adapt to a social-media world. Research teams have the tools to measure the value of social media, the neutral position in the business to report back without bias, and the authority to present their findings as the best solution.

## Section 4

# Data, Metrics and KPIs

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- 4.1 The Taxonomy of metrics
- 4.2 Validity and reliability
- 4.3 Working with the platforms

With the growth in platforms and the proliferation of metrics the challenge is to select the right metrics for a specific purpose. There are four key sources of metrics, each with merits and issues:

- The platforms, such as Facebook, YouTube, and Twitter.
- The client, when owned media is being used.
- Third parties, such as ComScore, Klout, and Google along with market research companies and social monitoring companies.
- Participants, for example location data gathered from mobile device users.

No single book or document can list and review all the metrics available, although Stephen Rappaport's *The Digital Metrics Field Guide* does a good job of reviewing 197 key metrics on 12 key fields. Selecting the metrics for a specific campaign or activity is likely to be a bespoke process. There is currently no simple template that can be applied. The five point plan outlined earlier in this chapter will help ensure the key items are covered.

The key issues surrounding the choice of data, metrics and KPIs are set out in the sections below.



The metrics used with social can be divided into the following broad categories:

### Followers/Fans



Including fans, contacts, people who have 'followed' a Twitter profile or 'liked' a Facebook page. As a metric these tend to be easy to count and have initial face validity. However, they are sometimes gamed, and tend to reflect the sum of historic interactions as opposed to current activities.

### Reach



A measure of how many people were able to see or interact with the content produced by a campaign. Its strength is that it produces a measure of breadth to complement a measure of volume. A key weakness is that opportunity to see does not necessarily imply impact.

### Time Spent



A useful measure for content that requires longer to consume, such as videos, games, or longer posts. The key strengths of time spent include that it can often relate to one of the objectives for a campaign and/or be a component of engagement. There are relatively few weaknesses with this measure, except where the material was intended to be used quickly and/or once.

### Volume



A measure of the amount of posts, including tweets, shares, and retweets. Volume is relatively easy to measure, but may not reflect the effectiveness of activity. The key weakness is that the amount of material produced is not necessarily directly related to its impact, and even the total amount of buzz created is not the same as the quality or effectiveness of the messaging.

### Engagement



Usually a derived measure, based on who is sharing, linking, commenting on, retweeting, liking, playing, viewing, or favouriting. The concept of engagement is widely accepted as a key measure of social. The key challenge is defining which elements should be combined to form a specific engagement metric. Another challenge is creating measurements that are easy to understand and consistent across platforms and over time. Most of the platforms have a preferred measure, as do many third parties, for example, Klout.

### Sentiment Analysis



Given the volume of data that social activity can generate, sentiment analysis is often analysed via automated systems. There is a wide degree of scepticism around the effectiveness of these. Some believe it can only be effective when analysed by individuals. And some organisations that do use automated systems try and check their validity by using colleagues to check sub samples of output from those automated systems for logic and accuracy.





## Validity and reliability

The chosen KPIs need to have the appropriate reliability and validity, covering the following key points:

### Validity.

Does the measurement correctly reflect what has happened, including internal and external validity?

### Reliability.

If the same measurement is run twice, measuring the same phenomena, will it provide the same results?

### Accuracy.

Can the data be collected with relative accuracy?

### Internal Validity.

Is the change being measured caused by the underlying phenomenon we are seeking to assess, for example, is the change in 'liking' caused by the campaign?

### External Validity.

Can the finding be generalised to other situations? For example, if the campaign is rolled out on a larger scale would the same effects be observed?

### Cost.

Can the data be collected at a reasonable cost?

A measure can be reliable without being valid, if it is measuring the wrong things, or with a systematic bias. And it can be valid without being reliable if it is unstable or prone to measurement error.

## Working with the platforms

There are a wide range of platforms, including Facebook, Twitter, LinkedIn, Pinterest and YouTube. Each of the platforms has its own strengths in terms of the metrics it can offer. The metrics from the platforms can be enhanced in two ways:



1. Working with the platforms to track behaviour, for example, by using cookies. The range of tracking options changes over time and the different platforms have different options, some going well beyond cookies and email addresses.
2. Third parties, such as Datalogix, comScore, Nielsen and others, offer additional options, in terms of metrics, identification and tracking.

One of the key things to keep in mind in terms of the platforms and the measurement of social is the potential to gain detailed inputs from paid and owned material – from the POEM model. When working with the platforms a variety of options are usually available to target who sees what and to track exposure and, in many cases, behaviour. Clearly, one cannot plan and target the volume and type of earned media that a campaign will generate, in the way one can for paid or owned media.

## Perspectives 4



One of the great problems caused by the explosion of new forms of media is that people have sought to understand this highly complex new environment through the lens of communication rather than through the lens of human psychology.

The distinction is important. People do not absorb messages - they process them, evaluate them, interpret them and draw probabilistic inferences from them before deciding whether or not to act. There are very good evolutionary reasons for this:

**Any naive individual who took all information at face value would have exited the gene pool fairly rapidly, as a victim of deception by others.**

Therefore, any evaluation of a medium simply on measures of how many people it reaches is woefully incomplete. You need to know how people process communication in that medium. Our information processing routinely goes into second and third order considerations of intent. One of my favourite

examples of this inference comes from social media: in reading hotel recommendations on rating sites, people were heavily influenced not only by the content of the comments, but by the standard of grammar and spelling with which comments were written. They used the information not only to infer whether people liked the hotel, but also to make assumptions about the kind of people who stayed there.

Understand that the inferences drawn may have almost nothing to do with the ostensible content of the message. For instance, a wedding invitation sent by email will contain exactly the same information as an engraved wedding invitation sent on a gilt-edged card, but your expectations of the wedding will be dramatically different either way.

**Rory Sutherland**  
Vice Chairman  
Ogilvy Group

## Perspectives 5: Facebook



It's imperative to focus on measuring through to business outcomes and metrics that are comparable to other channels, both online and offline. Only with uniform metrics used across media channels is it possible to make accurate comparisons against a common yardstick.

Independent third parties, like the IPA, are crucial to extending and formalising the understanding of how platforms like Facebook play their part in the customer journey. Our partnerships are driven by doing joint research to educate the industry not just on Facebook but digital marketing and increasingly mobile marketing and consumer behaviour more broadly.

**The holy grail of advertising effectiveness research is being able to match someone who has seen an ad, wherever that ad exposure took place, through to a behavioural reaction like requesting a test drive or buying a product online or offline.**

"Closing the loop" provides the opportunity to not understand whether a channel works, but more importantly how it works and what elements of a campaign were most successful.

A key challenge that the industry faces in measuring digital campaigns is the rise in the number of devices that people now use to access the internet. Many of us now have a computer at home and at work, a tablet at home, and a device in our pocket. Using these devices, we access the web through a myriad of apps and browsers, each one creating digital cookie crumbs for advertisers.

However, measurement today is about cookies not people, but it's imperative that we move toward people-based measurement and soon. People-based measurement gives marketers both accuracy and transparency. For example, our recently announced Atlas platform delivers people-based marketing, helping marketers reach real people across devices, platforms and publishers. By doing this, marketers can easily solve the cross-device problem through targeting, serving and measuring across devices. And, Atlas can now connect online campaigns to actual offline sales, ultimately proving the real impact that digital campaigns have in driving incremental reach and new sales.

**Mark Bulling**  
Advertising Research  
Facebook

## The benefits and challenges ahead – A final view from our lead author



“The challenges of measuring social are more than compensated for by the value social can deliver and the advice in this guide will help unlock that value, integrating social into a broader framework”.

Ray Poynter  
The Future Place

### The key benefits that I expect to see in the future of social media are:

- Ever larger amounts of data, in terms of coverage and granularity, combining media experience, social activity and behaviour.
- The growth in new sources of data, such as location-based research and the use of wearables.
- Better text analytics, allowing open-ended comments to become even more central to interpreting what people say and think.
- The development of bots to interact with people in social, to evaluate what they are doing and to supply services and responses.
- A shift to measuring the real world, as it is lived, rather than via constructed instruments and tests.

### The two key challenges, for the evaluation of social, are going to be:

- The challenge of separating correlation from causality will become harder with more data, from more sources, collected from real life, rather than from carefully designed exercises.
- The challenge of remembering that the biggest brand effects are long-term, in a world where the short-term can be measured so effectively and the results of the short-term used to manage campaigns and activities.

## Contributors

### #IPASocialWorks

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The fact that people have made contributions to the project does not mean they necessarily endorse or agree with the entire report.

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Whether you want to submit case studies, collaborate, or share your/your company's expertise in another way, we want to hear from you.

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